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BRAND AWARENESS - 1977

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I. SUMMARY

Four hundred smokers were sent instructions and ballots designed to determine smokers' awareness of cigarette brands and smokers' classifications of brands with regard to whether they would consider buying each brand if their regular brand were not available.

Ballots for each of the two basic parts of the test were sent to smokers representative of the general population of filter smokers.

There were three kinds of ballots, and one kind of ballot was sent to each panelist. On Ballots IA and IB, 40 non-menthol brands and 33 menthol brands, respectively, were listed. These ballots were sent to the appropriate types of smokers who were instructed to cross out the names of brands they had not heard of. On Ballot II there were 40 blank spaces, and panelists were instructed to write the names of as many brands as they could think of.

For each brand not crossed out on Ballots IA and IB or for each brand named on Ballot II, panelists were instructed to check one of the following responses:

If my own brand were not available . . .

1. I would definitely consider buying this brand.
2. I would definitely not consider buying this brand.
3. I would not know enough about this brand to consider buying it.

Ballots IA, IB, and II resulted in responses from 85, 38, and 134 panelists, respectively. This report deals with the results of the current study and with a comparison of the results with those of the 1976 study.

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II. CONCLUSIONS

On Ballot II where panelists had to think of brands themselves, recall of brands generally followed sales (within a segment). However, the non-menthol versions of brands which originated with a segment, such as Benson & Hedges, Virginia Slims, Silva Thins, and Eve in the 100 mm segment and Vantage, Merit, True, and Carlton in the low-tar segment, were recalled more frequently than non-menthol brand extensions such as Marlboro and Winston 100's and Lights. In the 100 mm and low-tar menthol segments, the menthol versions of those brands listed above had very little, if any, advantage over the extensions of Kool and Salem. Apparently, a low-tar or 100 mm version of Kool or Salem is more credible than a menthol version of a basically 100 mm or low-tar brand.

On both types of ballot the number of people who responded "I would definitely consider buying this brand" as opposed to "I would definitely not consider buying this brand" generally followed sales (within a segment). However, among low-tar brands, panelists responded more favorably to brand extensions than to "original" low-tar brands.

Both of the effects above having to do with differences in responses to extensions and non-extensions were observed in the 1976 study and were more pronounced then. Apparently, the distinction in smokers' minds between extensions and non-extensions is becoming less important.

The responses to two Philip Morris brands departed from what were generally fairly predictable patterns. For a brand with its sales volume, Merit was poorly recalled, however, responses to Merit were generally more favorable than responses to other "original" low-tar brands. These results support a growing feeling that Merit deserves more attention than it is getting. Responses to Saratoga were also notable. The recall of Saratoga and the responses to Saratoga were significantly worse than for More and at best comparable to Max which has less than half the sales volume of Saratoga. On Ballots IA and IB more people indicated that they had never heard of Saratoga than for any other brand listed. More also did poorly in that regard.

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III. INTRODUCTION

The first brand awareness study, motivated by a consumer behavior article¹ in the Journal of Marketing, was conducted in the fall of 1975 and discussed in a 1976 special report.² The thesis of the Journal of Marketing article was discussed in the 1976 special report (Introduction) and will not be repeated here.

In the 1976 study, it was found that smokers' awareness of cigarette brands and their responses to cigarette brands followed patterns dependent on the segment, sales, and age of a brand and on whether the brand was an extension. The main value of the study was in indicating which brands did not follow the general patterns.

For example, poor recall of a brand compared to the recall of brands of corresponding category, age, and sales would suggest that advertising for the brand was inadequate in making smokers aware of the brand. If a comparatively large percentage of smokers responded "I would not know enough about the brand to consider buying it," the advertising for the brand must not be informative enough. If responses to a brand were unfavorable (and the brand itself was adequate), advertising must be conveying the wrong information or image for the brand.

Since 1975 several significant new brands have been introduced (Merit, Now, Real, Salem Lights, and Kent Golden Lights). In the fall of 1977 a second brand awareness study was begun to determine how smokers' awareness of and responses to brands had changed since 1975, to determine smokers' reactions to the new brands, and to determine whether responses to any Philip Morris brands failed to conform to the general patterns.

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1. Narayana, Chem L. and Markin, Rom J., "Consumer Behavior and Product Performance: An Alternative Conceptualization," Journal of Marketing, Vol. 39 (October 1975), pp 1-6.
 2. Tindall, John E., "Brand Awareness." 1976 March 19. Unpublished Internal Report No. 76-036.

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IV. DETAILS OF THE STUDY

For the 1978 brand awareness study the ballots, instructions, and panels were basically the same as for the 1976 study. However, because of the proliferation of brands, it was necessary to make some changes, and those changes affected the comparability of results between the 1976 and 1978 studies.

A. Ballots

In the 1976 study two types of ballots were used, one with 42 brands listed (both menthol and non-menthol) and one with 20 blank spaces.

For the current study the ballot with brands listed was replaced by two ballots, Ballot IA and Ballot IB. Ballot IA listed 40 non-menthol brands and was sent only to non-menthol smokers. Ballot IB listed 33 menthol brands and was sent only to menthol smokers. Those versions of brands specifically named on Ballots IA and IB represented 86% of market sales. As an indication of the necessity of using two ballots and of the extent of brand proliferation, the 1976 ballot listed only 42 versions of brands representing 90% of market sales. For these ballots panelists were instructed to cross out the names of brands they had not heard of and to check one of three possible responses for the remaining brands.

For the 1976 study the open-ended ballot had 20 blank spaces and panelists were instructed to write the names of as many brands as they could think of counting different versions of a brand as different brands. Even in that study 20 spaces were not adequate for many panelists; the median number of brands listed was 16. The open-ended ballot for the current study, Ballot II, had 40 blank spaces. For each brand named, panelists were to check one of three possible responses.

For each brand not crossed out on Ballot IA or IB or for each brand listed on Ballot II, panelists were instructed to check one of the following responses:

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If my own brand were not available . . .

1. I would definitely consider buying this brand.
2. I would definitely not consider buying this brand.
3. I would not know enough about this brand to consider buying it.

With regard to the three possible responses above, the current study was exactly the same as the 1976 study.

Ballots IA, IB, and II and the instructions for each are shown in Appendix B.

B. Panelists

Ballot IA was sent to a representative cross-section of 150 non-menthol filter smokers, Ballot IB was sent to a representative cross-section of 60 menthol filter smokers, and Ballot II was sent to a representative cross-section of 200 filter smokers. Non-filter smokers were not included in the panels for two reasons. They are seldom used and generally result in a poor response rate. The ballots for this test were sent with regular cigarette tests none of which involved non-filter smokers.

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V. RESULTS OF THE STUDY

There were 85, 38, and 134 responses to Ballots IA, IB, and II, respectively, for a combined response rate of 64%. The response rate for Ballot II, on which panelists had to recall brands, was not significantly different from the response rate for Ballots IA and IB combined.

The two types of ballots gave different types of information. Ballot II gave an indication of how well panelists could recall brands. However, since recall of brands generally followed sales, there were many brands of interest for which there were too few responses to give useful results on panelists' opinions of those brands. For Ballots IA and IB the percentage of panelists claiming to have heard of a brand was high (over 57%) for all brands listed. Therefore, Ballots IA and IB were used to measure panelists' opinions of brands. Furthermore, the favorableness of responses to brands (the percent who said they would consider buying a brand as opposed to the percent who said they would not consider buying a brand) was consistently higher on Ballot II than on Ballots IA and IB. Apparently, panelists are more likely to recall brands to which they are favorably disposed than brands to which they are unfavorably disposed.

Tables A1 and A2 in Appendix A show tabulations of the responses to Ballots IA and IB and the number of smokers of each brand among the respondents. Table A3 shows the percentage of panelists recalling each brand in both the 1976 and 1978 studies. Brands mentioned by less than three percent of the panelists in the 1978 study were omitted from Table A3. Since there can be confusion about which version of a brand a panelist intended to write, a tabulation was made of the number of panelists who listed each brand name on Ballot II, without regard to the number of versions listed on the ballot. Table A4 shows the number of panelists recalling each brand name and the recall rank and 1977 sales rank for each brand.

A. Ballot IA Results

In Table A1 the brands are arranged by segments and in order of 1977 sales within each segment. Within each segment except the low-tar segment there is a reasonably regular pattern to the responses: As sales decrease...

1. The number of panelists who said they would consider buying the brand decreases
2. The number of panelists who said they would not consider buying the brand increases

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3. The number of panelists who said they would not know enough about the brand to consider buying it increases
4. The number of panelists who said they never heard of the brand increases.

The patterns above do not apply in the low-tar segment. In that segment panelists responded much more favorably to extensions than to non-extensions. Table 1 below shows that the result is not simply due to favorable responses to extensions by full-flavor smokers. Both full-flavor and low-tar smokers responded much more favorably to extensions than to non-extensions. The numbers in Table 1 are totals for all brands in the various categories, including 100 mm low-tar brands.

Table 1: Responses of Full-Flavor and Low-Tar Smokers to Low-Tar Extensions and Non-Extensions

	<u>Full-Flavor Smokers</u>	<u>Low-Tar Smokers</u>
Extensions: Would Consider Buying	77	70
Would Not Consider Buying	83	27
Non-Extensions: Would Consider Buying	63	78
Would Not Consider Buying	155	90

Extensions also fared better than non-extensions in the number of panelists who said they wouldn't know enough about a brand to consider buying it and the number who indicated they had never heard of a brand.

The patterns discussed above are basically the same as were observed in the 1976 study. The main difference between the 1976 and 1978 results is that, as should be expected, the responses to low-tar brands were generally more favorable in the current study.

Among the non-extensions, in their respective categories, Merit and Merit 100's were responded to most favorably, but more panelists also responded that they wouldn't know enough about Merit or Merit 100's to consider buying them.

Saratoga did not compare favorably with More. More panelists said they had never heard of Saratoga than for any other brand on the ballot (twice as many as for More), and the responses to Saratoga were unfavorable compared to More although the numbers are small.

B. Ballot IB Results

The patterns of responses to non-menthol brands on Ballot IA were duplicated in every respect by the patterns of responses to menthol brands on Ballot IB.

On Ballot IB Merit Menthol compared more favorably with other menthol versions of low-tar non-extensions in terms of the number of panelists who "wouldn't know enough about it" than did Merit non-menthol.

Saratoga Menthol compared more favorably with More Menthol than Saratoga non-menthol compared with More non-menthol.

Table 2 gives the same type of result for menthol smokers and brands as Table 1 gave for non-menthol smokers and brands.

Table 2: Responses of Full-Flavor and Low-Tar Smokers to Low-Tar Extensions and Non-Extensions

	<u>Full-Flavor Menthol Smokers</u>	<u>Low-Tar Menthol Smokers</u>
Extensions: Would Consider Buying	49	35
Would Not Consider Buying	42	9
Non-Extensions: Would Consider Buying	17	31
Would Not Consider Buying	16	32

Among low-tar menthol brands the extensions appear to have an even bigger advantage over non-extensions than the non-menthol extensions had over non-menthol non-extensions.

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C. Ballot II Results

In Table A3 brands are again arranged by segment and ranked according to 1977 sales within a segment. The percentage of the panel naming each brand in both 1975 and 1977 is shown. Brands mentioned by less than three percent of the panelists in 1977 are not shown. A slash in the 1975 column indicates that a brand did not exist in 1975.

Generally, on Ballot II, the recall of brands decreased with decreasing sales, within a segment. There were two important exceptions to that rule and two important exceptions to the exception:

1. In the 100 mm, full-flavor, non-menthol segment, non-extensions such as Benson & Hedges, Virginia Slims, Silva Thins and Eve were recalled much more frequently than extensions with corresponding sales. However, while recall of the non-extensions was virtually the same as in 1975, recall of extensions increased by a factor of about two.
2. In the 100 mm, full-flavor, menthol segment, recall of extensions also improved by about a factor of two, but that improvement left the non-extensions (Benson & Hedges, Virginia Slims, Silva Thins, and Eve) with virtually no recall advantage in 1977.
3. In the 85 mm, low-tar, non-menthol segment, non-extension again had a sizable advantage over extensions in recall. As with 100 mm brands, recall of extensions had improved since 1975 by a factor of about three.
4. In the 85 mm, low-tar, menthol segment, non-extensions had virtually no advantage over extensions even though one of the extensions, Salem Lights, had not even been introduced in 1975.

To summarize those points, brands which originate with a segment such as Benson & Hedges in the 100 mm segment and Vantage in the low-tar segment have a recall advantage over brands which are extended into those segments. However, among menthol brands the advantage disappears. Apparently, when a smoker thinks of the menthol, low-tar segment or the menthol, 100 mm segment the menthol classification overrides the other classifications. He appears to be more likely to think of 100 mm or low-tar versions of basically menthol brands than to think of menthol versions of brands which are basically 100 mm or low-tar. This may explain why the menthol versions of most low-tar brands are doing comparatively poorly. Menthol low-tar more easily suggests Salem Lights or Kool Milds than Vantage Menthol or Merit Menthol.

Also, even for non-menthol brands, the advantage of non-extensions is less than it was in 1975. Apparently, the extensions are developing more of their own identity.

In both 1975 and 1977 Marlboro was recalled less frequently than Winston. The consistency of the numbers suggests that the difference is significant. In this study Marlboro was probably named less often because panelists must write the names of brands and "Marlboro" is a potentially difficult name to spell.

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In Table A3 the results for most Philip Morris brands are in line with the general patterns although Merit and Saratoga were not recalled as frequently as their nearest competitors. Merit and Merit Menthol were recalled less than either Vantage or Real. Saratoga and Saratoga Menthol were recalled much less than More and only slightly more than Max. On the basis of recall it is clear that More has established itself as the leading representative of the 120 mm segment.

D. Recall of Brand Names

Table A4 shows the number of panelists who recalled each brand name, without regard to the number of versions of the brand listed. The table also shows the recall rank and the 1977 sales rank for each brand name.

It is reasonable to expect that recall rank and sales rank will be different for new brands which have low sales but high awareness due to the high level of introductory promotion. There should also be disagreement for very old brands whose sales are small compared to their reputations.

Table A4 shows a discrepancy between sales and recall for Merit, and Merit does not fall into either of the categories mentioned above. Apparently, Merit has achieved its high sales rank with comparatively low consumer awareness.

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APPENDIX A

Table A1: Responses to Brands on Ballot IA

Table A2: Responses to Brands on Ballot IB

Table A3: Percentage of Panel Naming
Each Brand on Open-Ended
Ballot (II) 1975 and 1977

Table A4: Number of Panelists Mentioning
Each Brand Name, Recall Rank,
and 1977 Sales Rank

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Table A1: RESPONSES TO BRANDS ON BALLOT 1A(Number of Non-Menthol Smokers Making Each Response and
Number of Non-Menthol Smokers of Each Brand in the Sample)

NON-MENTHOL BRANDS	1977 Sales	Would Consider Buying	Would Not Consider Buying	Would Not Know Enough	Never Heard Of It	Number of Smokers
85 mm Full-Flavor						
Marlboro	71.96	47	20	10	0	10
Winston	57.70	51	22	4	0	11
Kent	11.70	40	29	9	0	5
Viceroy	9.39	26	29	24	0	2
Raleigh*	7.11	11	35	31	1	1
Tareyton	7.00	21	33	23	1	0
Camel*	6.59	12	42	19	2	2
L&M	5.95	27	32	18	1	1
Parliament	5.57	22	29	25	2	1
Lark	2.90	12	32	31	4	0
Old Gold*	2.69	12	31	27	8	0
100 mm Full-Flavor						
Winston	16.95	49	22	5	2	3
Marlboro	14.79	40	21	14	2	0
Benson & Hedges	14.09	31	22	23	2	1
Pall Mall*	9.00	18	33	24	2	1
Kent	6.40	31	26	18	3	0
Tareyton	5.59	20	29	26	3	1
Virginia Slims	5.13	23	21	30	4	0
Raleigh*	3.19	9	36	29	4	1
Parliament	2.87	20	27	27	3	2
Viceroy	2.81	22	27	28	2	2
Lark	1.45	9	29	29	9	2
Silva Thins	1.33	12	21	33	10	1
Eve	.85	14	16	35	13	0
85 mm Low-Tar						
Vantage	11.95	18	22	35	2	1
Winston	9.35	45	23	8	0	2
Marlboro	8.85	40	22	16	0	5
Kent	7.93	28	25	21	2	0
Merit	7.65	16	15	40	8	4
Carlton	5.64	10	23	37	7	0
True	5.12	14	32	30	1	2
Doral	2.60	12	34	26	3	0
Now	1.93	8	16	34	20	0
Real	1.57	10	23	35	11	1
100 mm Low-Tar						
Merit	3.26	16	15	36	11	0
Vantage	3.00	18	21	32	5	1
Winston	2.67	39	26	9	3	4
True	2.31	13	28	31	5	0
120 mm						
More	3.30	17	16	32	14	0
Saratoga	1.46	4	9	37	29	0

*Possible confusion with non-filter versions.

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Table A2: RESPONSES TO BRANDS ON BALLOT IB(Number of Menthol Smokers Making Each Response and
Number of Menthol Smokers of Each Brand in the Sample)

MENTHOL BRANDS	1977 Sales	Would Consider Buying	Would Not Consider Buying	Would Not Know Enough	Never Heard Of It	Number of Smokers
85 mm Full-Flavor						
Kool	41.81	19	8	3	0	4
Salem	26.00	20	9	3	0	6
Newport	6.16	12	12	9	0	0
Belair	5.52	15	9	8	1	3
Marlboro	1.30	9	9	14	1	0
100 mm Full-Flavor						
Salem	13.65	20	9	4	0	1
Kool	10.49	17	8	7	0	1
Benson & Hedges	9.09	12	10	10	1	2
Virginia Slims	4.39	6	12	13	2	1
Belair	3.17	11	11	9	2	0
Winston	1.45	7	14	11	0	0
Silva Thins	.90	3	11	18	1	0
Pall Mall	.84	3	10	17	3	0
Newport	.82	9	10	12	1	1
Eve	.55	4	10	13	10	0
Kent	.45	6	12	13	2	0
L&M	.30	8	9	14	1	0
85 mm Low-Tar						
Salem	8.80	19	11	3	0	2
Kool Milds	5.06	17	11	5	0	1
Vantage	2.40	7	6	14	6	2
True	2.23	7	11	8	7	1
Merit	2.15	6	9	12	6	2
Doral	1.60	4	12	14	3	1
Carlton	1.57	5	11	11	6	0
Kool Lights	1.09	14	9	6	2	0
Kent Golden Lights	1.01	8	9	13	3	0
Now	.90	3	7	12	11	1
Real	.90	1	8	13	10	0
100 mm Low-Tar						
Salem	5.25	19	9	5	0	0
True	1.23	6	11	9	7	1
Merit	1.22	6	6	13	6	0
120 mm						
More	2.55	6	5	10	12	0
Saratoga	.71	2	1	16	14	1

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Table A3: PERCENTAGE OF PANEL NAMING EACH BRAND
ON OPEN-ENDED BALLOT (II) 1975 AND 1977

(Brands Ranked by Sales Within a Segment)
(Brands Named by Less Than 3% of Panel Omitted)

	% 1975	% 1977		% 1975	% 1977
85 mm Full-Flavor Non-Menthol			85 mm Low-Tar Non-Menthol (cont.)		
Marlboro	80	81	Now	--	25
Winston	88	91	Tareyton	--	4
Kent	49	67	Real	--	34
Viceroy	51	49	Multifilter	0	4
Raleigh*	39	46	L&M	--	4
Tareyton	43	51	Raleigh	1	4
Camel*	23	22	Fact	3	13
L&M	42	40	Pall Mall	1	7
Parliament	31	35	Old Gold	--	4
Lark	30	13	Lucky 10's	2	4
Old Gold*	36	23			
Pall Mall*	--	4	85 mm Low-Tar Menthol		
85mm Full-Flavor Menthol			Salem	--	23
Kool	80	82	Kool Milds	3	17
Salem	83	84	Vantage	1	13
Newport	27	27	True	8	20
Belair	33	32	Merit	--	10
Marlboro	8	10	Doral	2	6
Alpine	5	5	Carlton	2	5
100 mm Full-Flavor Non-Menthol			Kent	--	7
Winston	12	20	Now	--	7
Marlboro	12	22	Real	--	11
Benson & Hedges	58	57	Fact	0	3
Pall Mall	20	27	Tareyton	--	4
Kent	4	9	Decade	--	4
Tareyton	3	10	100 mm Low-Tar Non-Menthol		
Virginia Slims	48	51	Merit	--	5
Raleigh	4	5	Vantage	--	7
Parliament	1	4	Winston	--	6
Viceroy	2	4	Kent	--	7
L&M	0	3	Benson & Hedges	--	8
Silva Thins	16	19	100 mm Low-Tar Menthol		
Eve	30	27	Salem	--	7
100 mm Full-Flavor Menthol			Iceberg	0	3
Salem	8	19	Kent	--	3
Kool	9	21	120 mm Non-Menthol		
Benson & Hedges	20	19	More	44	42
Virginia Slims	5	16	Saratoga	16	12
Winston	9	7	Max	13	10
Silva Thins	2	4	Tall	--	6
Pall Mall	8	5	120 mm Menthol		
Newport	0	4	More		17
Eve	4	3	Saratoga	Included	3
Kent	3	5	Max	Above	3
L&M	4	4	Non-Filters		
85 mm Low-Tar Non-Menthol			Pall Mall	73	73
Vantage	29	51	Camel	88	87
Winston	8	25	Lucky Strike	74	60
Marlboro	8	28	Chesterfield	49	42
Kent	--	19	Philip Morris	21	19
Merit	--	34	Raleigh	3	5
Carlton	15	31	Kool	5	7
True	41	43	Tareyton	1	3
Doral	22	23	Old Gold	3	3

* Possible confusion with non-filter versions.

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Table A4: NUMBER OF PANELISTS MENTIONING EACH BRAND NAME, RECALL RANK, AND 1977 SALES RANK

BRAND NAME	No. Panelists Recalling Name	Recall Rank	1977 Sales Rank	BRAND NAME	No. Panelists Recalling Name	Recall Rank	1977 Sales Rank
Winston	124	1	2	Philip Morris	25	29.5	31
Camel	116	2	8	Silva Thins	25	29.5	27
Salem	114	3.5	4	Decade	23	31	--
Marlboro	114	3.5	1	Fact	18	32	34
Kool	112	5	3	Lark	17	33	24
Pall Mall	106	6	5	Saratoga	16	34	30
Kent	97	7	6	Max	15	35	35
Benson & Hedges	81	8.5	7	Tall	9	36	--
Lucky Strike	81	8.5	20	Alpine	7	37	36
Tareyton	75	10	10	Multifilter	6	38	32
Vantage	72	11	9	Iceberg	4	39	37
Virginia Slims	69	12	15	Laredo	3	41	--
Viceroy	66	13	12	Winchester	3	41	--
Raleigh	62	14	13	Ovals	3	41	--
True	61	15	14	Spring	2	44.5	38
L&M	58	16	16	Marvel	2	44.5	--
Chesterfield	57	17	23	Lemon Twist	2	44.5	--
More	55	18	22	Players	2	44.5	--
Merit	48	19	11	Montclair	1	51.5	--
Parliament	47	20	18	Fatima	1	51.5	--
Real	46	21	29	Sano	1	51.5	--
Belair	44	22	17	Encore	1	51.5	--
Carlton	42	23	19	Waterford	1	51.5	--
Newport	37	24.5	21	Dunhill	1	51.5	--
Eve	37	24.5	33	Cavalier	1	51.5	--
Old Gold	35	26	26	Bull Durham	1	51.5	--
Now	34	27	28	Piedmont	1	51.5	--
Doral	32	28	25	Half & Half	1	51.5	--

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APPENDIX B

Ballot IA and Instructions

Ballot IB and Instructions

Ballot II and Instructions

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INSTRUCTIONS FOR BALLOT 1A

Dear Panelist:

One of our clients is interested in learning what cigarette brands you are aware of and how you feel about those brands.

On the attached ballot most non-menthol cigarette brands are listed. Read the list and cross out the name of each brand you have not heard of.

For the remaining brands check the one column after each brand which best describes how you feel about the brand.

When you have finished, please return your ballot in the enclosed postage paid envelope.

Thanks for your cooperation.

Cordially,



A. F. Cantile
Panel Leader

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BALLOT 1A

Cross out the brands you have not heard of. (If a brand is available in either menthol or non-menthol, the name below refers to the non-menthol version.)	If my own brand were not available... (check one for brands not crossed out)		
	I would definitely consider buying this brand.	I would definitely not consider buying this brand	I would not know enough about this brand to consider buying it.
Camel Filters			
Viceroy			
Viceroy 100's			
L&M			
Doral			
Real			
True			
True 100's			
Vantage			
Vantage 100's			
Kent			
Kent (Delux Length) 100's			
Kent Golden Lights			
Virginia Slims			
Tareyton			
Tareyton 100's			
Merit			
Merit 100's			
Old Gold Filters			
Parliament			
Parliament 100's			
Winston			
Winston (Super King Size) 100's			
Winston Lights			
Winston Long Lights (100's)			
Benson & Hedges 100's			
Pall Mall (Gold) 100's			
Lark			
Lark 100's			
Marlboro			
Marlboro 100's			
Marlboro Lights			
Raleigh Filters			
Raleigh 100's			
More			
Carlton			
Silva Thins			
Eve			
Now			
Saratoga			

What is your regular brand? (specific name) _____

Is it ☐ Menthol or ☐ Non-Menthol
☐ Filter or ☐ Non-Filter
☐ Regular Length or ☐ 100mm/120mm

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INSTRUCTIONS FOR BALLOT IB

Dear Panelist:

One of our clients is interested in learning what cigarette brands you are aware of and how you feel about those brands.

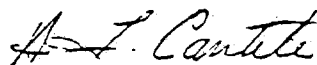
On the attached ballot most menthol cigarette brands are listed. Read the list and cross out the name of each brand you have not heard of.

For the remaining brands check the one column after each brand which best describes how you feel about the brand.

When you have finished, please return your ballot in the enclosed postage paid envelope.

Thanks for your cooperation.

Cordially,



A. F. Cantile
Panel Leader

1000764363

BALLOT IB

Cross out the brands you have not heard of. (These are all menthol brands.)	If my own brand were not available... (check one)		
	I would definitely consider buying this brand.	I would definitely not consider buying this brand.	I would not know enough about this brand to consider buying it.
Saratoga Menthol			
Real Menthol			
Kool			
Kool (Longs) 100's			
Kool Milds			
Kool Super Lights			
Winston Menthol 100's			
L&M Menthol 100's			
Newport			
Newport 100's			
Merit Menthol			
Merit Menthol 100's			
Benson & Hedges 100's Menthol			
Doral Menthol			
Salem			
Salem 100's			
Salem Lights			
Salem Long Lights (100's)			
Silva Thins Menthol			
Marlboro (Green) Menthol			
Kent 100's Menthol			
Kent Golden Lights Menthol			
Virginia Slims Menthol			
Pall Mall 100's Menthol			
Carlton Menthol			
Now Menthol			
Vantage Menthol			
Belair			
Belair 100's			
More Menthol			
True Menthol			
True 100's Menthol			
Eve Menthol			

What is your regular brand? (specific name) _____

Is it ☐ Menthol or ☐ Non-Menthol
☐ Filter or ☐ Non-Filter
☐ Regular Length or ☐ 100mm/120mm

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INSTRUCTIONS FOR BALLOT II

Dear Panelist:

One of our clients is interested in learning what cigarette brands you are aware of and how you feel about those brands.

On the attached page under the heading "Brand Names" please write the names of as many cigarette brands as you can think of without referring to other sources. If you know of several versions of a brand such as menthol and non-menthol, filter and non-filter, king size and 100 mm length, or regular and low tar, use a separate line for each version. Don't hesitate to list a brand because you aren't sure of the exact name or spelling.

After you have listed as many brands as you can, check the one column after each brand which best describes how you feel about the brand.

When you have finished, please return your ballot in the enclosed postage paid envelope.

Thanks for your cooperation.

Cordially,



A. F. Cantile
Panel Leader

1000764365

[illegible]

Is it ☐ Menthol or ☐ Non-Menthol
☐ Filter or ☐ Non-Filter
☐ Regular Length or ☐ 100mm/120mm

Source: <https://www.industrydocuments.ucsf.edu/docs/nkxk0006>

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APR 20 1977

W. F. GANNON

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